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ENGENDERING INDUSTRIES:
CHANGE MANAGEMENT COACHING FOR
ORGANIZATIONAL GENDER EQUALITY

ENGENDERING INDUSTRIES: CHANGE MANAGEMENT COACHING FOR ORGANIZATIONAL GENDER EQUALITY

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INTRODUCTION

Expanding women's participation in male-dominated industries leads to tangible economic empowerment outcomes for women, such as formal employment opportunities and higher incomes. Increased gender equality can also improve business performance and help organizations meet their bottom line by enhancing employee satisfaction, reducing turnover, and driving productivity.

Increasing gender equality and women's empowerment in male-dominated industries requires commitment, a tailored strategy, and the support of an experienced change management coach. This coaching guide is intended for use by individuals or firms who are supporting organizations to increase gender equality in the workplace. It draws upon the coaching experience of [USAID's Engendering Industries](#) program, which has increased gender equality worldwide. This guide should be used alongside the Engendering Industries [Best Practices Framework](#), a free online resource that outlines over 130 actions organizations can take to increase gender equality across the eight phases of the employee life cycle and the four organizational enablers that surround it (see page 4),

Individuals who are skilled and experienced in both gender equality and organizational change management are well positioned to provide the coaching organizations need to advance gender equality in concrete and tangible ways and ensure that long-term change is sustainable. The coaching relationship is most effective when one dedicated expert works with a small group of employees and/or managers who are in a position to persuade, influence, or motivate broad change at an organization. Over the course of the relationship, the coach supports these employees to analyze gender equality gaps, design and implement interventions that are tailored to the organization's specific needs, and monitor organizational progress toward gender equality. More information about the role and responsibility of the change management coach can be found in the sample coach scope of work in [Annex A](#).

ABOUT ENGENDERING INDUSTRIES

This coaching guide is based on lessons learned and experience from USAID's Engendering Industries program. [Engendering Industries](#) delivers a unique approach to improving gender equality in male-dominated sectors. Through customized best practices in its [Delivering Gender Equality: A Best Practices Framework for Male-Dominated Industries](#), demand-driven coaching, and a Gender Equity Executive Leadership Program (GEELP), Engendering Industries builds the capacity of leaders and professionals to implement gender equality interventions in their organizations. Under Engendering Industries, mid- to senior-level employees enroll in the GEELP, a customized 12-month course designed in partnership with Georgetown University McDonough School of Business. The course trains participants to implement gender equity throughout their organizations' policies and practices and strengthens participants' organizational strategy, change management, communication, and persuasion skills, so that upon graduation participants are fully prepared to make the business case for gender equality to their CEOs. The participants also receive intensive virtual bi-weekly change management coaching prior to, during, and after the GEELP course for approximately two years to help them act on the course content and take steps that are rooted in the Best Practices Framework to improve gender equality in their respective workplaces. Coaching over a sustained period of time by an expert with organizational coaching experience focused on gender, diversity, and inclusion is critical to supporting the results achieved by Engendering Industries partners.

THE COACH'S ROLE

The change management coach supports the organization to adapt, create, and implement gender equitable policies and practices at each phase of the employee life cycle. The coach also strengthens the capacity of the organization's personnel to think strategically about how gender equality could improve business performance, examine corporate culture through a gender lens, and propose initiatives that will foster gender equality and create a workplace environment that supports inclusion.

“COACHING IS THE MAIN PATHWAY FOR US TO DO EVERYTHING. IMAGINE A FOOTBALL TEAM WITHOUT A COACH.”

- KOSTT/KOSOVO

THE COACH SUPPORTS INDIVIDUALS WITHIN THE ORGANIZATION TO:

- Review, adapt, and implement international gender equality best practices (see *Delivering Gender Equality: A Best Practices Framework For Male-Dominated Industries*);
- Identify gaps, constraints, and opportunities to improve gender equality at the organization;
- Define strategic approaches, a business case, visions, targets, related interventions, and support structures;
- Develop and/or improve gender equitable policies and practices for their organization;
- Improve organizational collection and analysis of data to monitor and evaluate effectiveness of the interventions, as well as track outcomes; and
- Lead organizational change and the implementation of gender equity and diversity best practices.

For a sample scope of work for a change management coach, see [Annex A](#).

THE ENGENDERING INDUSTRIES APPROACH TO COACHING

The Engendering Industries' approach to coaching is rooted in the eight phases of the employee life cycle (ELC), which are used as entry points for gender equality initiatives. Coaches also work with organizations to review four key enablers of gender equality. The eight phases of the ELC and the four organizational enablers are at the heart of all coaching discussions and planned interventions. The Best Practices Framework, which outlines over 130 actions known to increase gender equality in the workplace, guides the evidence-based implementation of strategic activities at each phase of the ELC.



PHASES OF COACHING

Coaches should strive to meet organizations where they are on their journey to gender equality, and coaching should be demand driven. Coaching sessions can vary in length of time and intensity depending on the needs of the partner. The coaching process can be broken down into the following four phases:

Assessment Phase	Definition Phase	Implementation Phase	Review Phase
<ul style="list-style-type: none"> ● Select organization and participants ● Build trusting relationship ● Assess status quo ● Perform SWOT to identify organizational gaps, needs, and effective entry points for interventions ● Assess need for support structure (e.g., change management committee) 	<ul style="list-style-type: none"> ● Define overall goal and targets ● Develop a coaching plan ● Turn goals into targets ● Develop business case ● Collect additional data ● Set objectives ● Develop plan to create a sustainable approach 	<ul style="list-style-type: none"> ● Provide technical assistance ● Provide policy support ● Provide motivation and accountability ● Conduct in-person coaching trips ● Establish coaching frequency 	<ul style="list-style-type: none"> ● Provide ongoing support to monitor activities ● Provide networking and mentorship opportunities

ASSESSMENT PHASE

SELECT AN ORGANIZATION AND INDIVIDUALS TO COACH

Before coaching can begin, an organization’s leadership must articulate their readiness for change, commit to the change process, and identify at least three individuals who will participate in coaching sessions. The following selection criteria should be used to identify organizations and individuals that are ready to embark on the change process.

PARTNER ORGANIZATION SELECTION CRITERIA:

Qualifying Partner Organizations Must Have	Qualifying Organizations Must Commit To
<ul style="list-style-type: none"> ● A CEO who demonstrates a commitment to and interest in improving gender equality at the organization and is willing to sign a Letter of Collaboration (LOC) (see Annex B for a sample LOC) ● Senior-level management champions who demonstrate genuine interest in and commitment to improving gender equality at the organization (through past/current actions and verbal agreement to program description and LOC) ● At least three qualifying management-level candidates (HR, operations, finance, other) who have the requisite time available for program participation to interact with coaches (see candidate criteria) 	<ul style="list-style-type: none"> ● Creating a mandate for the organization to work on gender equality (if one does not already exist) ● Implementation of gender equality interventions ● Collection and sharing of sex-disaggregated data, case studies, success stories, best practices, and other information for public relations communications purposes ● Detailing the decision-making process for policy changes and making reasonable efforts to follow this process ● Making time available for selected individual candidates to successfully participate in coaching

EMPLOYEE SELECTION CRITERIA

- Must be a mid- to senior-level manager
- At least one selected candidate must be from the HR department
- At least one selected candidate should be male
- Candidates must apply by providing their CVs, responding to a questionnaire, and participating in a phone interview, which collectively assesses:
 - Program interest/enthusiasm
 - Gender equality awareness
 - Experience in gender equity and change management
 - Educational background
 - Communication capacity and ability to participate in coaching session
 - Women’s growth potential (either growth for the person or person with the ability to support women’s empowerment in the organization)
 - Influence and impact
 - Bandwidth
 - Overall impression

BUILD A TRUSTING RELATIONSHIP

“COACHES ARE IMPACTFUL. THEY CREATE MOMENTUM AS SOMEONE FROM OUTSIDE, FOLLOWING ACTIVITIES AND PROGRESS.”

- DELSUR/EL SALVADOR

Coaches should plan to invest the time required to establish a positive and collaborative working dynamic and to assess the organization’s constraints, needs, strengths, and weaknesses. To build an effective working relationship, coaches should:

- Plan for two to three in-person coaching visits to meet with participants, senior leadership, department heads, and other stakeholders;
- Establish commitment from the organization’s leadership and ask leaders to sign a Letter of Collaboration (See [Annex B](#) for a sample LOC);
- Assess the needs of the organization and identify priority areas for coaching support aligned with the employee life cycle, laying the groundwork for a basic understanding of gender equality and change management fundamentals; and
- Support the organization’s personnel to familiarize themselves with the employee life cycle and the Engendering Industries Best Practices Framework.

INTRODUCE KEY CONCEPTS

It is the coach’s responsibility to ensure that all participants have a working knowledge of change management and gender equality concepts. The coach should begin by training all participants in the fundamentals of change management and gender equality, as all future coaching sessions will build on this critical foundation. This includes:

Change Management: Transitioning individuals, teams and organizations from a current state to a desired future state, in order to fulfil or implement a vision and strategy. An organizational process aimed at empowering employees to accept changes in their current environment. (Source: [Handbook on Gender and Organizational Change](#)).

Gender Equality: The equal enjoyment by women and men of socially valued goods, opportunities, resources, and rewards. The objective of gender equality initiatives and interventions is to empower women and men to take on non-traditional roles, to benefit equally from economic and societal opportunities, and ultimately to reach gender balance in all aspects of the society and economy.

Gender Equity: Gender equity leads to gender equality. Gender equity refers to processes, resources, strategies, and measures that ensure fairness between women and men and that compensate for historical and social disadvantages that prevent women and men from enjoying the same opportunities.

“COACHES ARE RESPONSIBLE FOR 80 PERCENT OF THE GENDER EQUALITY LEARNING AND ACTIONS TAKEN AT OUR UTILITY.”

- BSES RAJDHANI POWER LIMITED/INDIA

CHANGE MANAGEMENT AND GENDER EQUALITY RESOURCES

The following resources can be used to orient participants to fundamental change management and gender equality concepts:

- Engendering Industries Gender 101 (forthcoming)
- Engendering Industries Change Management 101 (forthcoming)
- 5 Change Management Best Practices, Whatfix. Available on [their website](#).
- Change Management Leadership Guide, Ryerson University. Available on [their website](#).
- Gender Strategy Toolkit, WGEA Australia. Available [here](#).

PERFORM A SWOT ANALYSIS

A Strengths, Weaknesses, Opportunities, and Threats (SWOT) analysis is a useful tool that helps an organization’s participants identify and assess the status of gender equality at the organization, including what they are doing well and what they need to improve. See [Annex C](#) for a sample SWOT template.

Some examples of a SWOT analysis might include:

STRENGTHS

- Senior management is supportive of gender equality efforts
- A positive and inclusive corporate culture exists at the organization

WEAKNESSES

- Gender concepts are poorly understood
- Few women hold leadership positions

OPPORTUNITIES

- National legislation supporting gender equality exists
- The organization is developing gender equality policies

THREATS

- Cultural biases could limit progress
- There is a limited talent pool of women graduating with STEM degrees

COLLECT DATA

Coaching should be an evidence-based and data-driven process. Data can be used to assess the status quo and identify gaps for strategic action. Data help organizations make decisions based on evidence instead of assumptions or presumptions made by leadership. Data can also be used to monitor progress toward achieving strategic objectives and to measure results. Organizations may already have strong data collection and analysis systems in place, including regular collection and analysis of sex-disaggregated data. However, many require support to improve data collection and analysis as part of the coaching support process. Many tools exist for supporting organizational gender equality analysis. The Engendering Industries program employs an extensive monitoring, evaluation, and learning (MEL) agenda to measure program impact.

A COACHING PLAN CAN INCLUDE:



- Overall organizational goals
- Targets for gender equity interventions
- Coaching support style needed
- The goals and frequency of coaching calls
- The organization's business case for gender equality
- Identified gender and change management IOI knowledge gaps and how these will be filled
- Potential risk or hindering factors
- Assessment of ability to impact and support mechanisms to be created
- SWOT or other assessment outcomes, which will guide coaching and development of interventions
- Action plan with planned interventions

DEFINITION PHASE

DATA COLLECTED FOR ENGENDERING INDUSTRIES

- **Staff Composition:** Data disaggregated by sex, age, education, job type and level to identify gender parity
- **Best Practices** across the 12 phases of the employee lifecycle to assess gaps in what is being done
- **Equity Results:** Metrics to measure equity results across the 12 phases
- **Business Performance:** Sector-specific technical and business performance metrics to correlate changes in gender parity and equity with performance

DEVELOP A COACHING PLAN

In order to ensure coaching is systematic and targeted, a coaching plan for each organization should be developed in collaboration with participants. The coaching plan stems from—and is responsive to—the gaps, opportunities, needs, and constraints identified during the assessment phase. The coaching plan articulates the organization's business case for gender equality, how goals and targets will be set and measured, and how actions will be sequenced, initiated, and implemented. See [Annex D](#) for a sample coaching plan template.

SET OBJECTIVES

Setting short-, medium-, and long-term gender equality objectives will help organizations prioritize actions and set time-bound goals. For more information on identifying priorities and setting goals, see the Engendering Industries [Organizational Goal Setting for Gender Equality and Inclusion](#).

- **Short-Term Objectives:** These are smaller adjustments accomplished in a shorter time frame (less than one year) that create impact and motivation with quick wins, but may not be sustainable without acting on them within the context of working toward medium- and long-term objectives. For example, drafting an Equal Employment Opportunity Policy is an important initial step toward equality, but requires longer-term behavior and culture change for impact.
- **Medium-Term Objectives:** These contribute to long-term objectives and build on the progress made by short-term activities, frequently over the course of one to two years. Often, these activities improve communications and outreach materials, increase access to training, and change systems to build knowledge and shift long-standing biases and perceptions.
- **Long-Term Objectives:** These are overarching gender equality goals that require the successful implementation of short- and medium-term actions. For example, long-term priorities might include a target (i.e. achieving 40 percent female staff or 30 percent in leadership positions by 2025) or an organizational change (i.e., inclusion and diversity becoming part of the company culture). Accomplishing long-term objectives can take three to five years.

ENSURE SUSTAINABILITY FROM THE BEGINNING

“COACHING ENABLED US TO UNDERSTAND OUR WEAKNESS AND THREATS AND TRANSFORM THEM INTO STRENGTHS AND OPPORTUNITIES.”
- EDM/MOZAMBIQUE

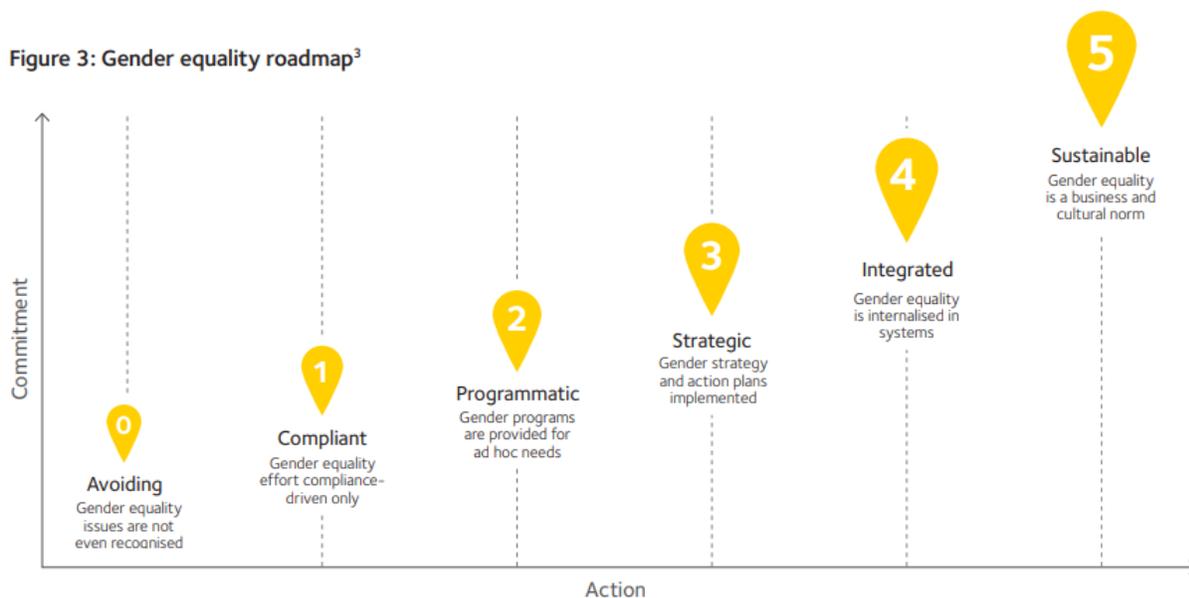
True, meaningful change will be sustainable when gender equality interventions become a **business and cultural norm**. Following the Gender Equality Roadmap model below, companies are supported to utilize strategic, integrated, and sustainable approaches to gender equality. This ensures that even after intensive coaching ends, the strategic interventions developed with the organization are sustainable.

For example, an ad hoc programmatic intervention might be celebrating *International Women’s Day* or hosting *Bring Your Daughter to Work Day*. These activities might be worthy of implementation if they contribute to overall goals, but are most effective when paired with long-term, sustainable, and strategic interventions such as creating a conducive work environment to ensure inclusion and progression of women in the organization or implementing gender-inclusive recruitment and hiring practices.

DEVELOP A BUSINESS CASE

Developing a business case for gender equality is critical for achieving buy-in and strategic action from all staff, particularly senior leadership. The business case can serve as the “guiding light” for achieving the overall vision, so all stakeholders know how improving gender equality can contribute to better business outcomes. It is important to ensure that the organization identifies its own strategic business priorities, examines sex-disaggregated organizational data analyzed during the assessment phase, and determines how gender equality can help achieve its strategic business goals. For more guidance on developing a business case, see the Engendering Industries [Developing a Business Case for Gender Equality](#).

Figure 3: Gender equality roadmap³



³ *Adapted from the Diversity and Inclusion Pathway© model developed by Diversity Partners Pty Ltd (www.diversitypartners.com.au) and shared with their kind permission.

BREAK DOWN THE GOAL INTO TARGETS

Setting targets for gender equality helps to ensure that organizations focus their resources and efforts towards achieving clear, measurable, and meaningful results. The simplest way to set targets effectively is to use the SMART target-setting logic:

Your targets should be **SMART**



S

Specific

M

Measurable

A

Achievable

R

Relevant

T

Time-Bound

For more guidance on setting targets, see the Engendering Industries [Guide for Setting Gender Equality Targets](#).

IMPLEMENTATION PHASE

PROVIDE TECHNICAL ASSISTANCE

The change management coach provides ongoing technical assistance to implement gender equality interventions within the organization. Change management coaches provide real-time support and problem solving as well as hands-on training sessions to continue to build participants' capacity to

increase gender equality within their organization. While it is most effective to continue working with and supporting the participants who enrolled in the coaching program, it may become necessary to extend support to a broader group within the organization, such as senior leadership, a change management committee, or others.

A change management coach may identify an organizational need for broad-based technical training or sensitization, such as unconscious bias training for HR personnel and managers, leadership training for women, male engagement training for men, or sexual harassment training for all employees. It is not the role of the coach to personally deliver this training, but rather to support the organization to identify the organization's training needs and identify a local consultant or training provider who is able to create a responsive training plan on topics that have been identified.

PROVIDE POLICY SUPPORT

Corporate policies lay the foundation for a supportive workplace culture and help ensure employees have a positive work experience and opportunity for advancement within the organization. When effective, they set the tone of an organization, demonstrate leadership commitment, and enable organizations to achieve gender equality in practice. Change management coaches support organizations to ensure policies are in place that set and track progress toward gender equality, identifying gaps or blind spots in the organization's existing policies. Change management coaches evaluate each policy of an organization with a gender lens to ensure that it contributes to gender equality, has a clear action plan, includes performance indicators, and is aligned with national legislation and international standards. For more guidance, see the Engendering Industries [Integrating Gender into Workplace Policies](#).

PROVIDE MOTIVATION AND ACCOUNTABILITY

As change management coaches form professional relationships with an organization's personnel, they are a source of motivation and accountability. The coaching supports development of change agents within the organization.

CONDUCT IN-PERSON COACHING VISITS

In-person coaching trips are a good opportunity to deepen the relationship with the organization, understand the reality on the ground related to challenges and opportunities, and meet with a broader group of stakeholders.

It is recommended to use an in-person engagement at the beginning of the coaching relationship to:

- Assess the starting point of the organization and identify first entry points for improving gender equality;
- Meet with a broader group of relevant stakeholders both for assessment and creating buy-in; and
- Clarify expectations of senior leadership of the organization.

More in-person interactions can be planned to:

- Present preliminary assessment results and gather ideas for future prioritized interventions;
- Provide training, including unconscious bias and gender 101 training;
- Create additional buy-in at multiple stakeholder levels and show appreciation for support provided to date; and
- Monitor progress, evaluate results, and develop a plan for phasing out with a sustainable approach.

ESTABLISH COACHING FREQUENCY

The coaching frequency should be determined on a case-by-case basis, in agreement with the organization and individual program participants. The amount of coaching required depends on the interventions to be implemented by an organization. Internal organizational coaches may also have competing priorities and workloads that shift over time, and this should be taken into consideration in the development of the coaching plan.

ENGENDERING INDUSTRIES COACHING FREQUENCY AND DURATION

Engendering Industries coaches participate in a one-hour coaching call with the three program participants every two weeks for two years. After two years the frequency is often reduced to a monthly coaching call, or on-demand coaching support. Additionally, three, three-day, in-person coaching visits are typically planned over the course of the partnership, and take place during initial onboarding, and then every six to nine months after that. Coaching is provided alongside the participants' engagement in the 12-month Gender Equity Executive Leadership Program (GEELP). This frequency and duration has proven to be successful in establishing a strong relationship with coaching participants, keeping up momentum toward planning strategic work, and allowing space for work on interventions between coaching calls.

REVIEW PHASE

PROVIDE ONGOING MONITORING

While the frequency of coaching sessions may decrease over time, the coach still plays an important role in supporting implementation of gender equality activities and providing tailored change management advice on an as-needed basis. On a regular basis, an organization should evaluate interventions for their effectiveness and whether they are still supporting the overall vision. The change management coach may play a role in supporting the organization to revise or identify additional activities and goals to encourage sustainability and ongoing improvements.

CONNECT ORGANIZATION WITH NETWORKING AND MENTORSHIP OPPORTUNITIES

After the coaching relationship ends, there are many ways that the change management coach can continue to support the organization. There are also many ways that the organization can continue to be an important player in influencing others and acting as a leader in gender equality. Graduates from the coaching program can stay connected with peers and continue learning about strategies that increase gender equality in the workplace. This can be accomplished through creating a virtual network through a platform such as LinkedIn, where participants can share their accomplishments, receive ongoing support, learn about the achievements of others, and hear about job and mentorship opportunities. Mentoring within the organization can be initiated, as well as across peer organizations if multiple organizations have received coaching. Pairing alumni with newer partner organizations from

similar industries can provide opportunities for participants to further network, share expertise, and advance their professional growth.

Networking can help participants to:

- Stay up to date on gender equality trends;
- Promote knowledge exchange by speaking at conferences and webinars and sharing lessons learned with other organizations;
- Showcase progress towards gender equality by promoting and amplifying the organization's success through newsletters, case studies, and social media; and
- Advance their careers, build their resumes, and become industry leaders by participating in speaking engagements or showcasing expertise in their field.

ANNEX A

SAMPLE SCOPE OF WORK FOR CHANGE MANAGEMENT COACH

OBJECTIVE/PURPOSE OF THE SOW

A Change Management Coach or Consultant (CMC) plays a critical role in supporting senior managers within organizations to develop and implement strategic gender equitable policies and practices across the employee life cycle, alongside workplace culture change.

SCOPE OF WORK/ACTIVITIES/TASKS

The coach's primary role is to introduce the main concepts on gender equality, gender equity, change management, and the Best Practices Framework; to build the capacity of the organizations' functions and change agents to drive the process; and to provide technical assistance for implementing gender equity interventions to increase gender equality within the organization. The coach will:

- Advise/coach on the implementation of gender equitable policies and practices for organizations in person and/or virtually;
- Introduce gender equality and gender equity concepts, change management concepts and tools, and the Best Practices Framework;
- Support data collection and analysis;
- Provide support and guidance to identify quick wins and mid- to long-term interventions;
- Support the development of a long-term strategic approach and the selection of suitable interventions to reach the related goals;
- Provide subject matter expertise to start the implementation of change management interventions;
- Provide an inside-out perspective to already initiated interventions and support the evaluation of the effectiveness of selected measures;
- Motivate the change agents along the change management process; and
- Support with training and awareness raising of the organization's staff (if applicable).

SAMPLE DELIVERABLES

1. Baseline assessment to identify the organization's starting point and support a data-driven approach to identify suitable interventions
2. SWOT analysis
3. Coaching plan, including a roadmap of coaching support required to support achievement of the organization's strategic gender equality objectives
4. Change management strategy including vision, mission, targets, milestones, and a supporting action plan with clear responsibilities and timeline
5. Policy review or development of gender equality policies
6. Organizational gender action plan identifying gender equity interventions along the employee life cycle that will help to close gaps and support the strategic objectives of the organization with regards to gender equality
7. Revised processes and function plans (e.g., hiring strategy, communication plan)

TYPICAL QUALIFICATIONS:

- At least ten years of experience working as a change manager, organizational developer in the field of gender equality, diversity, and inclusion or other value-oriented fields
- Ability and experience in advising senior managers including CEOs in organizations
- Must have experience working in HR-related fields such as recruitment, training, mentorship, HR policies development and risk assessment, inclusive workplaces, and corporate culture change
- At least five years of experience working in the industry sector and/or other male dominated sectors
- At least ten years of experience working as a trainer, ideally in the fields of diversity and inclusion, leadership, anti-discrimination, awareness raising, and unconscious bias
- Ability to motivate people to follow and to engage different stakeholders within an organization
- Experience in male engagement an asset
- Minimum of a master's degree in human resources, organizational development, or related field
- Experience working in developing country contexts
- Fluency in English and/or a language spoken by the targeted audience
- Superior interpersonal and communication skills
- Ability to strategically push coached individuals toward organizational change

ANNEX B

SAMPLE LETTER OF COLLABORATION

LETTER OF COLLABORATION

[ORGANIZATION]'s Partnership with [PARTNER ORGANIZATION/COACH]

The purpose of this Letter of Collaboration (LOC) is to signify [ORGANIZATION]'s commitment to become a partner of [NAME OF PROGRAM].

Through this LOC, [PARTNER ORGANIZATION/COACH] and [ORGANIZATION] commit to work together in the implementation of this Program to:

1. Jointly analyze how [ORGANIZATION] can increase gender equity within the organization in order to increase the professional participation of women, including in leadership and decision-making roles.
2. Actively establish a more gender-balanced workplace within [ORGANIZATION] through the implementation of tailor-made gender equity interventions, ultimately leading to an environment where gender equality is a core value and women can productively contribute to the achievement of the goals of [ORGANIZATION].

This Letter of Collaboration Commitment (LOC) is effective on XXXX.

INTRODUCTION AND BACKGROUND

[INSERT INTRO AND BACKGROUND ON PROGRAM]

OBJECTIVES

The goal of this program is to establish and/or improve policies to lessen gender disparities, establish a greater gender balance in the workplace, and further enhance capacity to improve gender equality within each new organization. As a partner, [ORGANIZATION], in collaboration with [PARTNER ORGANIZATION/COACH], will identify policies, processes, and practices that can improve gender equality outcomes. With the technical support of [PARTNER ORGANIZATION/COACH], [ORGANIZATION] commits to identifying, designing, implementing, monitoring, and evaluating gender equity interventions that address gender gaps within the organization. Additionally, [ORGANIZATION] will track and report the overall impact of the gender interventions on a [FREQUENCY] basis.

ACTIVITIES

EXPERT COACHING

To support [ORGANIZATION] toward the above-mentioned objectives, and to implement the identified priority interventions, the organization (namely the selected participants) is provided with approximately XX hours of virtual coaching and XX in-person coaching sessions by the assigned coach over a XX period. Experienced coaches will leverage tailored tools and global best practices through the Engendering Industries *Delivering Gender Equality: A Best Practices Framework for Utilities*.

Participating organizations and selected participating personnel must work collaboratively and cooperatively with the coach to maximize coaching benefits, select and analyze data, create and conduct interventions, and communicate/report on activities and success of interventions. Organizations and personnel must:

- Allow coach to have access to the organizational information needed to advise and support the personnel meaningfully;
- Ensure participants allocate sufficient time to work with the coach so that the coach may provide support on data collection and related interventions; and
- Accept the coach as a core part of the team to support the design and implementation of prioritized gender equity interventions, providing the coach necessary access to information and personnel.

At the same time, it is understood that the coach, as part of the [PARTNER ORGANIZATION/COACH] team, treats all information provided by the organization as confidential unless the organization grants permission to use for external communication purposes.

IMPLEMENTATION OF INTERVENTIONS

As a result of participation in [PROGRAM], any number of interventions may be implemented by [ORGANIZATION] throughout the partnership with [PARTNER ORGANIZATION/ COACH]. The interventions specifically address key needs throughout the employee life cycle, as identified by the organization, and will be informed by evidence-based best practices that increase gender equity. Some examples of possible interventions are:

- Adopt equal employment opportunity statements;
- Develop and implement plans to address identified equal pay gaps;
- Disaggregate employment and employee satisfaction data by sex and use this data in decision-making;
- Draft and adopt new policies to address gender equity and implement and enforce these policies at all levels of the organization;
- Adopt behavior-based interviewing techniques to reduce bias in hiring processes;
- Engage educational institutions in outreach activities to promote gender equitable attraction of students;
- Purchase appropriate equipment for women in the field and implement safety and equipment training with women; and
- Develop mentorship programs that identify and support women in gender-equitable succession planning.

DATA ANALYSIS, REPORTING AND COMMUNICATION

The organization and participants are expected to:

- Provide relevant data for reporting and assessment on a quarterly basis, using the reporting templates provided by the [PARTNER ORGANIZATION/COACH] team.
- Support data collection and provide relevant documents for a baseline assessment as well as completion of a scorecard in the beginning and end of the program.
- Provide communication material such as pictures, summaries of activities, and other information (e.g., contact details for interview partners and role models) to [PARTNER ORGANIZATION/COACH] to facilitate communication on success.

Contact for the program is [NAME] of [PARTNER ORGANIZATION/COACH].

ROLES AND RESPONSIBILITIES

- I. [PARTNER ORGANIZATION/COACH] is committed to supporting [ORGANIZATION] in its efforts to increase gender equity within the organization during its

participation in [PROGRAM]. [PARTNER ORGANIZATION/COACH] will 1) keep informed of program developments and accomplishments; 2) provide technical input to guide program implementation and overall strategy; 3) regularly communicate with [ORGANIZATION] and conduct site visits in order to monitor progress and provide technical assistance.

2. Clarify and resolve any issues or concerns that might arise.
3. Ensure that [PARTNER ORGANIZATION/COACH] successfully implements its assigned responsibilities, which include:
 - Provide overall technical and logistical support to implement [PROGRAM] in [ORGANIZATION];
 - Provide approximately XX hours of tailored virtual coaching and XX in-person coaching sessions to the selected organization participants;
 - Provide guidance and tools to support the organization's ongoing data collection and communication materials as required by the program; and
 - Cover all direct costs associated with expert coaching for the three selected middle- to senior-level manager participants.

AS A PARTNER IN [PROGRAM], [ORGANIZATION] COMMITS TO:

1. Put a mandate in place, immediately upon signing this LOC, to improve gender equality in the workplace (if none already exists).
2. Identify and make available three personnel (at least one senior manager, and at least one from the HR Department) to work with their assigned coach for a duration of XX months.
3. Commit, at the highest level, to fully supporting the participating staff members' participation in [PROGRAM], including allocation of in-kind contribution of the required staff time and ensuring buy-in of their line managers for full participation in the above-mentioned activities.
4. Commit to implementation of the [PROGRAM] gender equity interventions based on the organization's baseline assessment. Interventions proposed will be reviewed and require approval by the organization's board before completion, as interventions proposed may require the organization to commit its own resources and the cooperation of other staff members.
5. Submit reports, including specific sex-disaggregated data as requested. Data will include the percentage of male/female employees, managers, and technicians in the organization, in addition to HR-related performance/satisfaction and corporate/financial performance metrics.
6. Share case studies, success stories, best practices, photographs, videos, and other information for public relations and communications purposes.
7. Detail the decision-making process for HR policy changes and make reasonable efforts to follow this process to adopt initiatives designed and implemented during the program period.
8. Provide, as in-kind contribution, meeting space, and communications systems for participating staff to use to successfully engage in the program.

[ORGANIZATION], as represented by [CEO NAME], acknowledges and agrees to the terms outlined in this LOC in order to become an official partner of [PROGRAM].

Signature: _____

Name/Title: _____

Date: _____

ANNEX C

SWOT ANALYSIS TEMPLATE

Strengths	<i>What are the principal strengths that support gender equality? People, policies, processes that are in favor?</i>
Weaknesses	<i>What are the internal weaknesses or challenges to gender equality? People, policies, processes that are obstacles to gender equality?</i>
Opportunities	<i>Are there external factors or opportunities that can advance gender equality at the organization?</i>
Threats	<i>Are there external factors or obstacles to advancing gender equality at the organization?</i>

ANNEX D

COACHING PLAN TEMPLATE

COACHING PLAN

Organization:

Country:

Coach:

PROJECT PLAN: COACHING PHASES

Coaching can be broken down into four phases as outlined below. The interventions to be implemented during each coaching phase will be identified in the course of the coaching. Coaches support organizations to:

- Identify gender equality gaps within their organization;
- Define the visions, targets, related interventions, and support structures; and
- Work on data collection and communicate and report outcomes.

Assessment Phase	Definition Phase	Implementation Phase	Review Phase
<p>Aims:</p> <ul style="list-style-type: none">● Identify gaps, needs, and good entry points for interventions● Assess need for support structure	<p>Aims:</p> <ul style="list-style-type: none">● Define overall goal and targets● Identify first measures	<p>Aims:</p> <ul style="list-style-type: none">● Implement defined interventions and collect lessons learned	<p>Aims:</p> <ul style="list-style-type: none">● Make interventions sustainable

COACHING PLAN OVERVIEW

Overall Organization Goal for Gender Equality	<i>High-level vision</i>
Targets for Gender Equity Interventions	
Organization-Specific Business Case for Gender Equality	
Coaching Frequency	<i>Add here how often you meet with the team</i>
Coaching Approach	<i>Add here what you need to consider as a coach (e.g., characteristics of the team and resulting coaching methods)</i>
Strengths	
Weaknesses	
Opportunities	
Threats	
Action Plan for Coaching the Organization	<i>Add here status, e.g., work in progress, final, etc., in which phase of the coaching developed</i>
	<i>Add in this section action plan items for coaching = what will be your steps to support them</i>
Organization Interventions Identified <i>(short-term, accessible interventions versus strategic longer-term interventions)</i>	<i>Add here status, e.g., work in progress, final, etc., in which phase of the coaching developed</i>
	<i>Add in this section organization interventions identified with information in which stage of the process in brackets</i>